

# Montana Cross-Agency Data Dashboard

## April-June 2014

### Overview

-The purpose of the Montana Cross-Agency Data Dashboard is to provide a complete snapshot of what's happening within the Montana Office of Tourism, what are the key travel indicators and how consumer-facing marketing initiatives are impacting those numbers.

-This report is intended for key stakeholders as well as agency partners-offering both a look back and a look forward and providing ongoing insights to guide future marketing initiatives.

### Key Takeaways from Q2 2014

-Increased consumer interest, engagement and visitation may be a result of an increase in Geotraveler-focused targeting. The Warm Season Key Market campaign and Digital Display advertising have demonstrated strong results thus far.

-The most recent studies from Leisure Trends Group also provide some good indications of the success of the previous warm season and most recent winter consumer marketing efforts.

-Unaided and aided advertising awareness of Montana (net) has risen significantly among Geotravelers since February 2009, an increase of 133% in unaided advertising awareness and a 100% increase in aided advertising awareness.

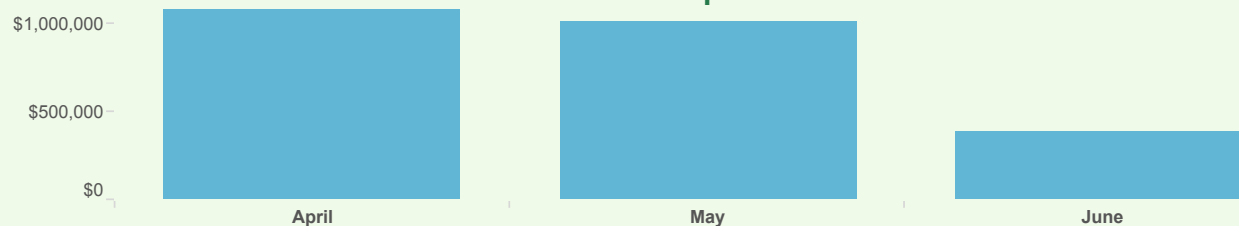
-39% of the Geotravelers who are aware of the advertising indicated that they are likely to travel to Montana in the next 18 months.

-Since February 2009, there has been a 43% increase in Geotravelers who have indicated that they have ever traveled to Montana.

# Executive Summary

**\$2,473,335**

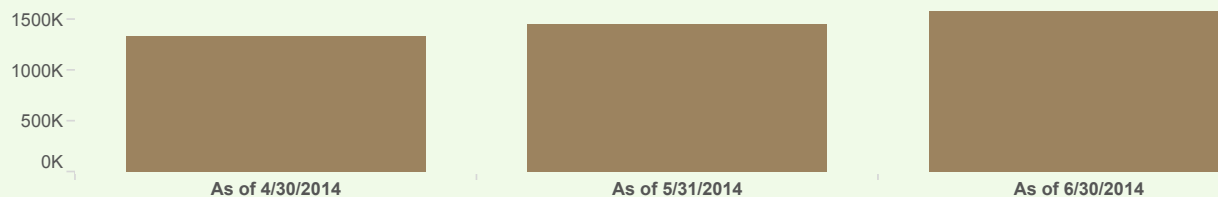
April-June 2014  
Media Spend



Source: Spark

**1,588,642**

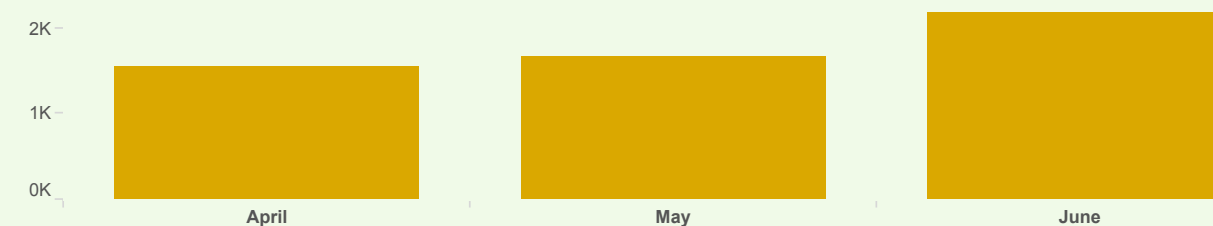
Social Engagements  
As of 6/31/2014



Source: Facebook, Twitter, Instagram, Tumblr

**22,027**

April - June 2014  
Total Social Media Mentions



Source: BrandWatch

## Summary and Insights

-The following metrics for paid, owned, and earned media are a few of the key performance indicators and will continue to be evaluated each quarter.

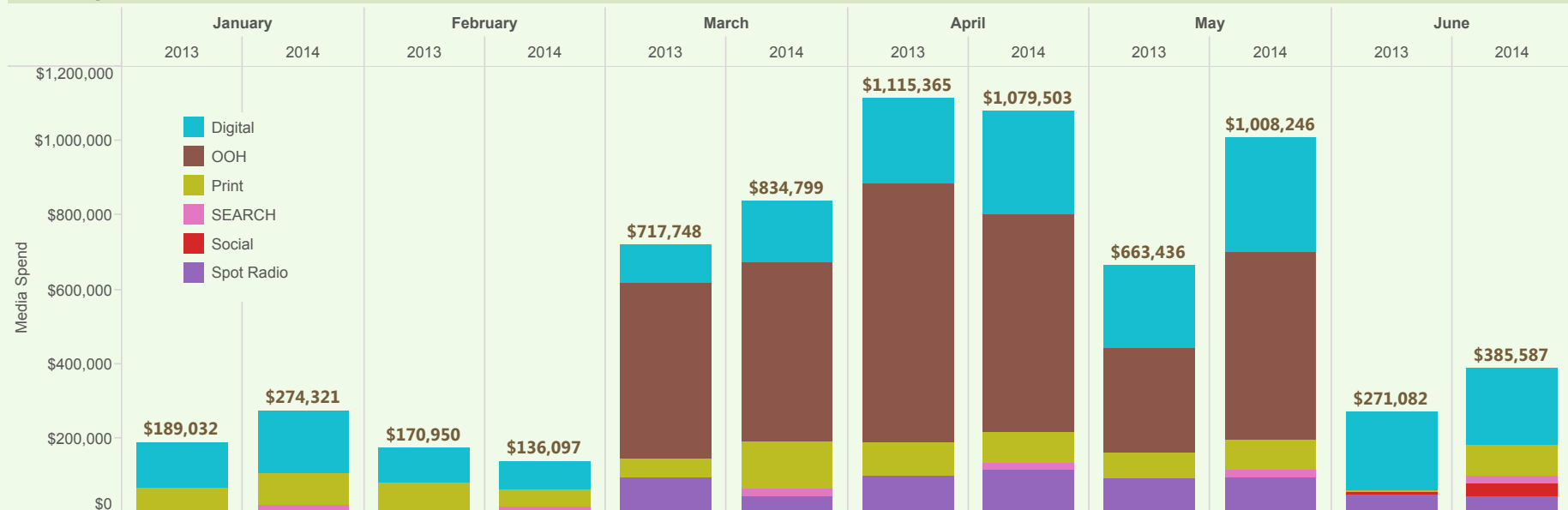
**Paid Media:** As the Warm Season key market push comes to an end in May, media spend drops off for the month of June. Approximately 65% of the media budget is spent on this Warm Season campaign, leaving about 35% for the winter months.

**Owned Media:** At the end of June, Social Engagements stand at 1,588,642. This is 95% of the FY14 Goal of 1,677,450 Social Engagements.

For website metrics, please refer to page 6.

**Earned Media:** This quarter saw 22,027 Total Social Media Mentions surrounding "#MontanaMoment" and "Montana" (state). This represents an increase of 35% over last quarter.

## Media Spend Breakout



Source: Spark, not inclusive of International

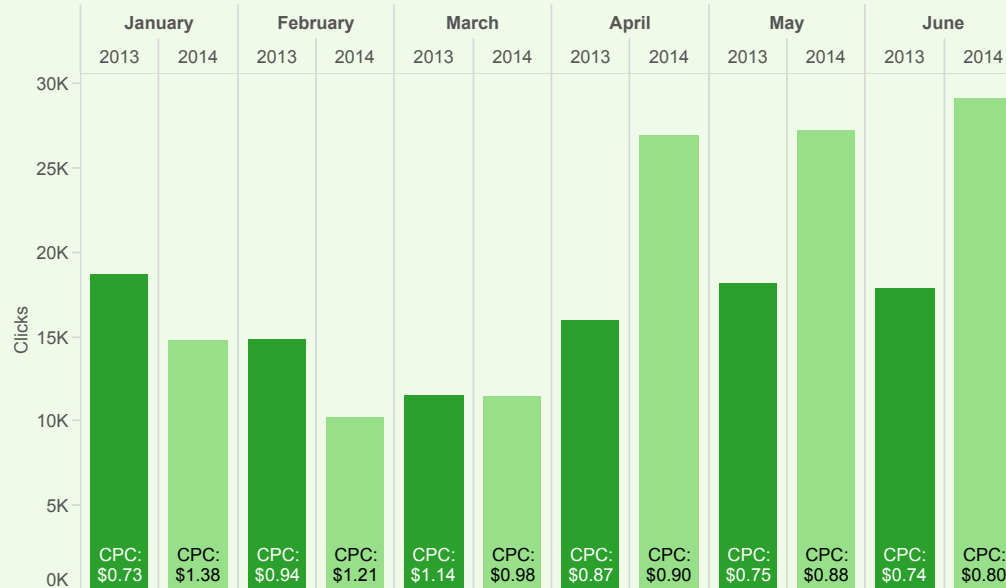
**\$3.72 Million**  
January-June Media Spend

Source: Spark, not inclusive of International

## Paid Media Highlights

- With much higher demand than the Winter Season, paid media sees a sizeable increase in spend as we enter peak Warm Season months.
- The Warm Season Key Market campaign push is heaviest from March-May to drive consumers to book their summer trips. The effort extended until the end of June this year and saw much stronger results compared to the same period in the previous year.

## Paid Search Clicks



Source: Spark

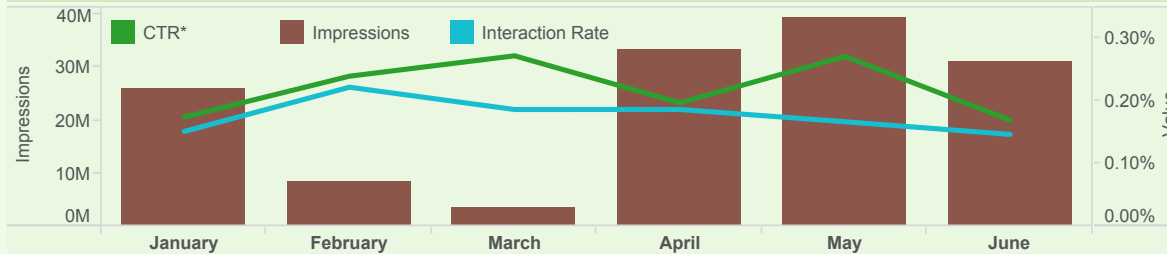
## Paid Search Performance 2014

	Clicks	Imps	CTR*	Average CTR (2014)	Cost	CPC*	Average CPC (2014)
January	14,776	3,971,662	0.37%	0.63%	\$20,372	\$1.38	\$0.97
February	10,264	3,149,771	0.33%	0.63%	\$12,391	\$1.21	\$0.97
March	11,483	2,329,875	0.49%	0.63%	\$11,296	\$0.98	\$0.97
April	26,870	4,668,489	0.58%	0.63%	\$24,144	\$0.90	\$0.97
May	27,236	2,540,689	1.07%	0.63%	\$24,086	\$0.88	\$0.97
June	29,172	2,238,040	1.30%	0.63%	\$23,395	\$0.80	\$0.97

## April - June 2014 Top 10 Search Keywords

	Clicks	Imps	CTR*	Cost	CPC*
glacier national park	8,739	394,745	2.21%	\$8,718	\$1.00
state park	7,661	774,533	0.99%	\$4,576	\$0.60
yellowstone	7,516	561,900	1.34%	\$7,810	\$1.04
yellowstone national park	6,182	437,313	1.41%	\$6,505	\$1.05
montana	5,903	479,392	1.23%	\$4,989	\$0.85
montana tourism	1,092	11,930	9.15%	\$522	\$0.48
montana map	886	61,445	1.44%	\$819	\$0.92
things to do in montana	707	11,674	6.06%	\$481	\$0.68
map of montana	564	45,885	1.23%	\$563	\$1.00

## Digital Display Impressions vs. CTR (2014)



## Overall Digital Display Performance (2014)

	Impressions		Total Clicks		CTR*		Interaction Rate	
	2013	2014	2013	2014	2013	2014	2013	2014
Jan	12,942,997	25,824,336	24,582	45,121	0.19%	0.17%	0.24%	0.15%
Feb	10,345,401	8,229,107	24,114	19,767	0.23%	0.24%	0.32%	0.22%
Mar	14,115,729	3,556,285	35,718	9,704	0.25%	0.27%	0.23%	0.19%
Apr	30,499,529	33,326,140	70,236	65,852	0.23%	0.20%	0.20%	0.19%
May	31,472,725	39,324,801	87,192	106,924	0.28%	0.27%	0.22%	0.17%
Jun	27,092,291	30,940,446	76,762	52,524	0.28%	0.17%	0.27%	0.15%

Source: Spark

## Paid Media Highlights

### Search

-In April, additional Search match type campaigns were built out, aiding in new keyword expansion and increased search volume driven to visitMT.com.

-On May 15, Montana Branded Search campaigns began serving mobile ads, where positive performance has led to more cost efficient site visits.

### Digital Display

-2014 saw heavier investments into Digital, with almost 10MM more impressions run in 2014 compared to 2013.

-In 2014, we partnered with more data-driven networks that target consumers behaviorally. Rather than strictly targeting people viewing Geotraveler web content, Montana is now reaching an audience based on their online browsing habits. This shift in strategy helps Montana to reach a broader, more qualified audience.

\*Key:

CTR: Click-through-rate (=Clicks/Impressions)

CPC: Cost per click (=Cost/Clicks)

# Owned Media



## Top Performing Social Media Spots (April - June 2014)

\*See Appendix for larger copy

### Facebook



8,072 Likes 141 Comments 3,300 Shares

Source: Facebook Analytics

### Twitter



114 Retweets 174 Favorites

Source: Twitter Analytics

### Instagram



619 Likes 20 Comments

Source: Instagram

### Tumblr

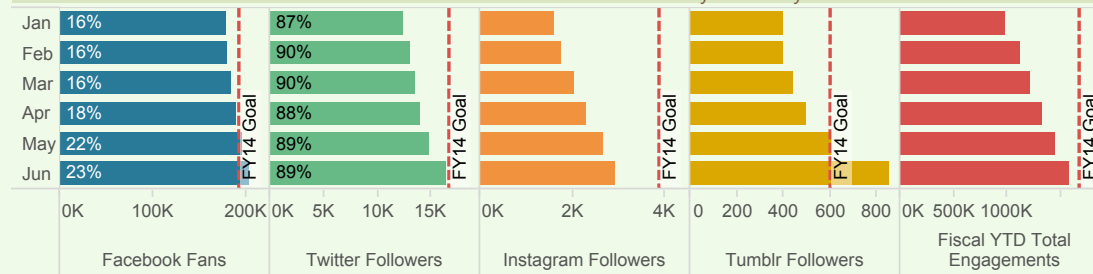


3,245 Engagements

Source: Tumblr

## Social Performance 2014

\*% is the year-over-year difference for each month



Source: BrandWatch via Big Fuel

## Owned Media Highlights

### Social Media

-Since the launch of the new Tumblr page, there has been substantial increases in visitation, return visits, and engagements.

-Facebook saw a 4% average growth in fans this quarter, compared to the first quarter's average of 1%.

-Average Instagram engagements saw a 16% increase in the second quarter compared to the first.

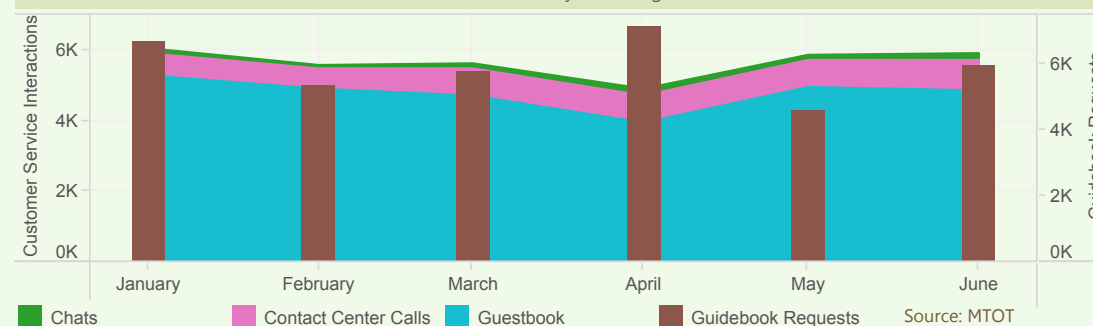
-Generally, photos displaying wildlife and attractions that are unique to Montana (e.g., red barns and "big sky" images) performed well across all channels.

### Email Marketing and Customer Service Interactions

-The largest number of individual guidebook requests for Q2 and the first half of the year were in April. Contact center calls and online chats received the most amount of traffic year-to-date in June.

## Customer Service Interactions

\*Year-over-year change in Customer Service Interactions is unavailable



Source: MTOT

# Owned Media

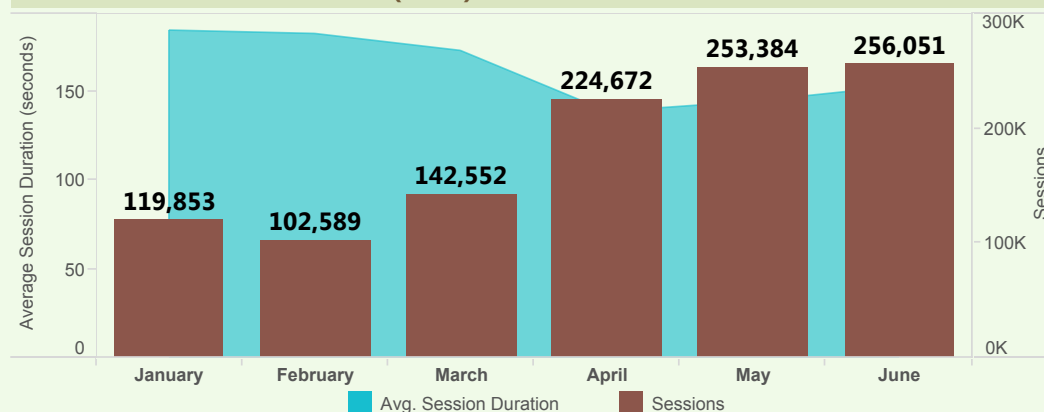
## VisitMT.com Performance Metrics

**734,107 (+21%)\***  
April-June Site Sessions

**146 seconds (-15%)\***  
April-June Average Session Duration

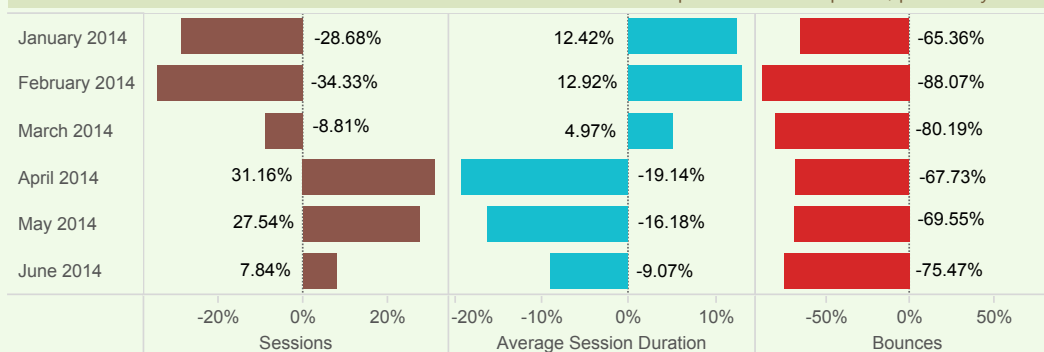
\*Change from 2013; "Sessions" are not unique

### Sessions vs. Session Duration (2014)



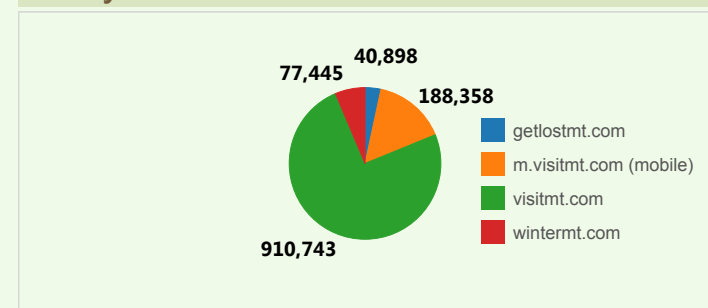
### % Difference Year-over-Year

\*Compares same time period, previous year



## All Montana Sites

### January-June 2014 Website Visitation



### 2014 Time Spent on Websites by Month (seconds)

	January	February	March	April	May	June
getlostmt.com	700,653	542,173	656,057	829,045	880,682	1,152,357
m.visitmt.com (mobile)	2,032,077	1,586,247	2,204,267	2,530,058	3,458,386	4,407,602
visitmt.com	20,101,022	17,163,258	22,406,663	28,669,345	32,992,873	34,755,703
wintermt.com	3,097,260	1,984,683	831,850	285,531	255,454	253,641

## Owned Media Highlights

-June generated the highest number of Sessions on m.visitmt.com (mobile) in Q2 2014, along with the highest Pages/Session rate (rate of 2.3).

-The Pageviews and Pages/Session rate for visitmt.com in Q2 was up over the same period from the previous year, peaking with a 92.4% increase in May.

-Compared to Q2 2013, the percentage of Sessions that were "New Sessions" was up overall for both visitmt.com and m.visitmt.com in Q2 2014.

-The Bounce Rate was down overall for both visitmt.com and m.visitmt.com in Q2 2014 compared to Q2 2013.

Source for All: Google Analytics

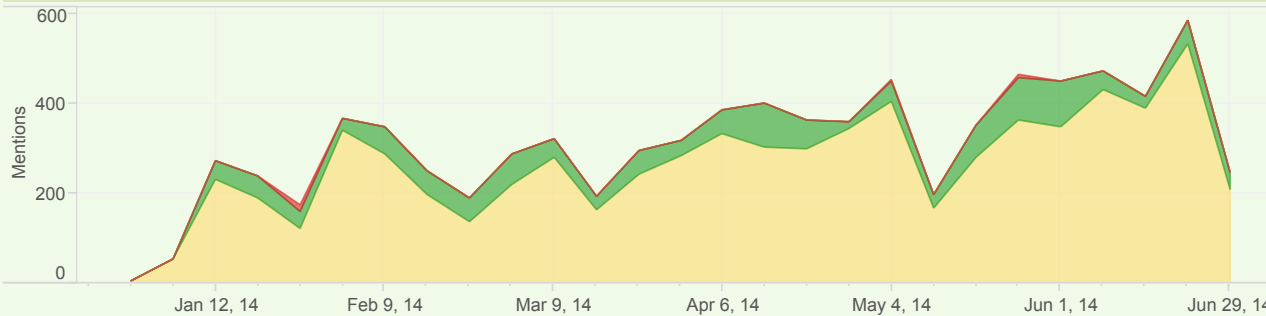


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# Earned Media

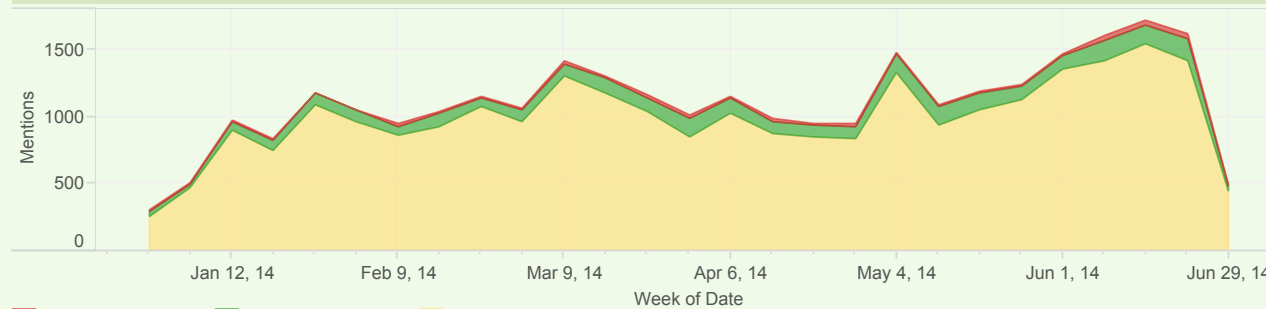
## #MontanaMoment Mentions

\*Year-over-year change in mentions is unavailable



## Montana (State) Mentions

\*Year-over-year change in mentions is unavailable



■ Negatives ■ Positives ■ Neutral

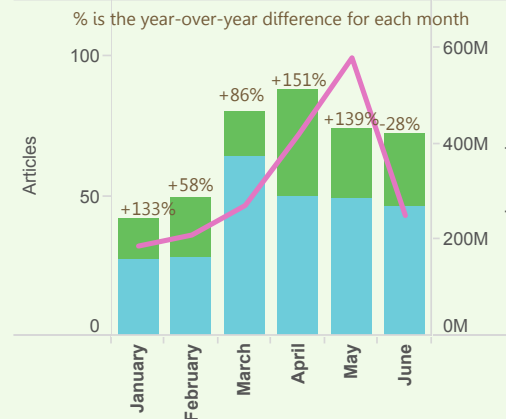
Source: BrandWatch

## April - June 2014 Top Trending Mentions



Source: BrandWatch via Big Fuel

## PR and Earned Media Exposure (2014)



Source: MercuryCSC

■ print, Articles

■ web, Articles

■ Impressions

## Earned Media Highlights

### Montana Mentions

-By the beginning of the Warm Season in June, consideration mentions increased by two-thirds compared to the end of the first quarter.

-Across Social Media, "visit Montana," "USA," "Lake," and "Yellowstone" are some of the words most often mentioned with Montana.

### PR and Earned Media Exposure

-MTOT held two press trips to Southeast Montana and to Missouri River Country in May and June, hosting a total of 9 journalists.

-FY14 Q2's total impressions (print and on-line) were 47.5% greater than FY13 Q2 impressions.

-MTOT's PR team secured feature articles in high-quality publications. Examples include: Go Escape, USA Today, Bike Magazine, Alaska Airlines Horizon Edition, the Calgary Herald, Sunset, Condé Nast Traveler, National Geographic, and The New York Times.

-All six tourism regions were represented in Q2's editorial coverage.

# Tourism Trends

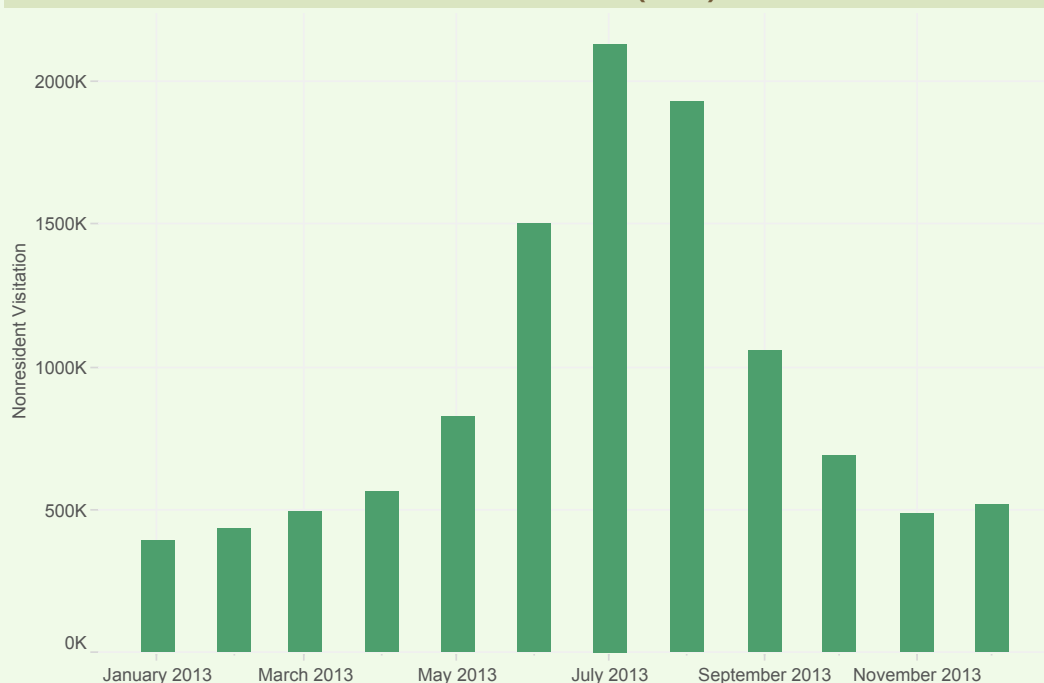
11,019,000

2013 Nonresident Visitors

\$3,624,480,000

2013 Nonresident Expenditures

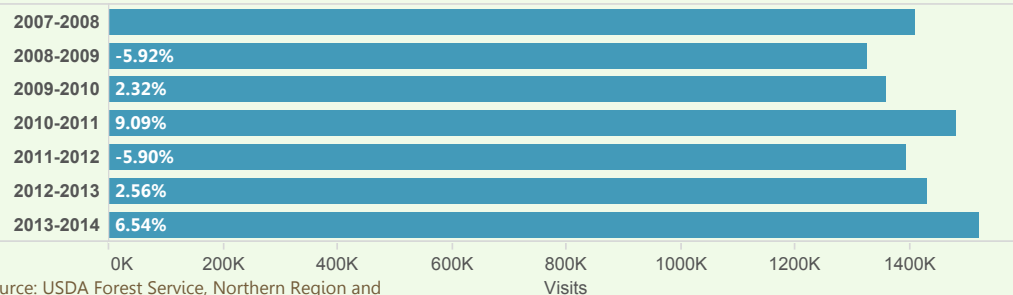
## Nonresident Visitation (2013)



Source: ITRR

## Skier Visitation

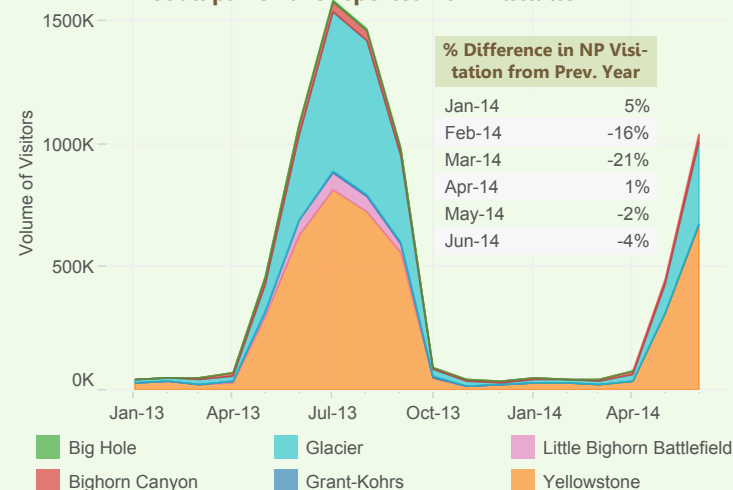
\*% is difference from previous winter



Source: USDA Forest Service, Northern Region and individual ski areas

## National Park Visitation (January 2013-June 2014)

\*Not all parks have reported 2014 visitation



\*Shows volume of visitors to national parks from 2012-2014. Each color represents the share of visitors that particular National Park held over time.

Source: National Park Service Public Use Statistics

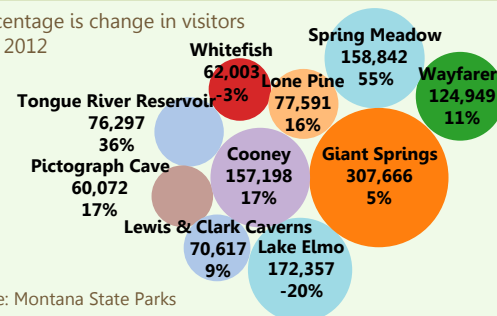
\*Little Bighorn Battlefield metrics current through January 2014; Big Hole metrics current through April 2014

## Overall State Park Visitation (2014)

	State Park Visits	% Difference from 2013
Jan-14	61,310	10%
Feb-14	47,142	-13%
Mar-14	88,061	4%
Apr-14	121,751	10%
May-14	221,028	17%
Jun-14	310,828	-8%

## State Park Visitation (2013)

\*Percentage is change in visitors from 2012



Source: Montana State Parks

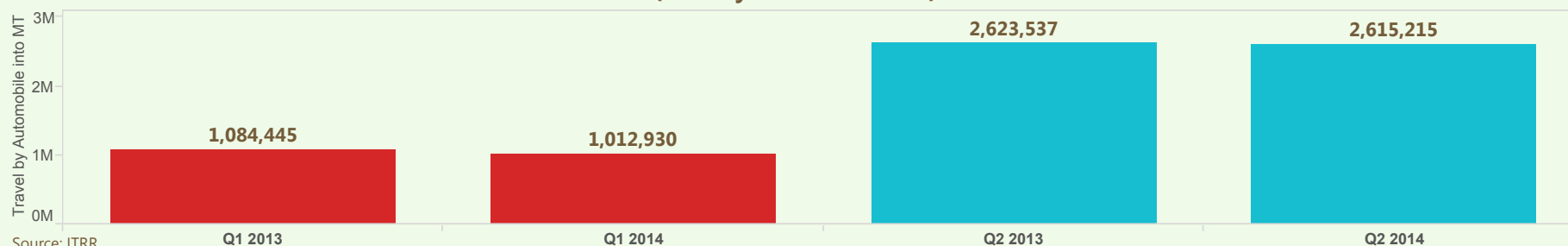


# Tourism Trends

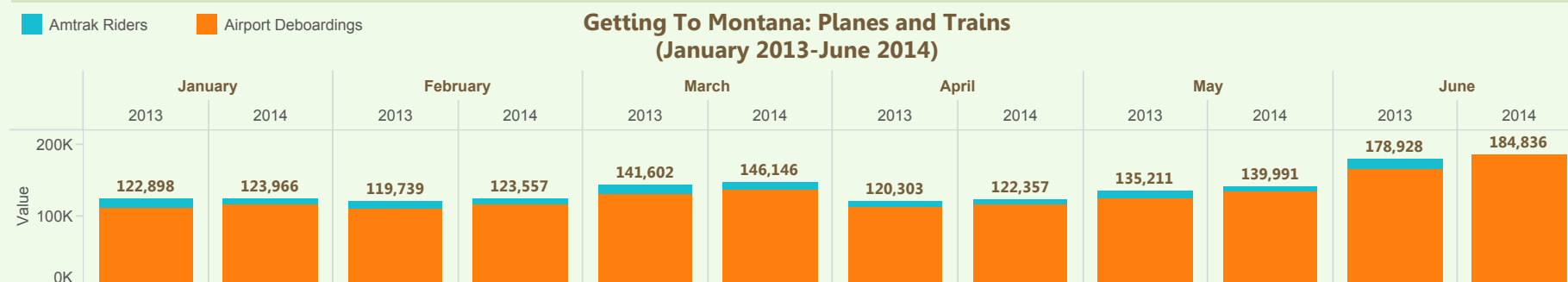
\*Please see Appendix for additional information

## Getting to Montana

### Getting To Montana: Motorized Vehicles (January 2013-June 2014)



### Getting To Montana: Planes and Trains (January 2013-June 2014)

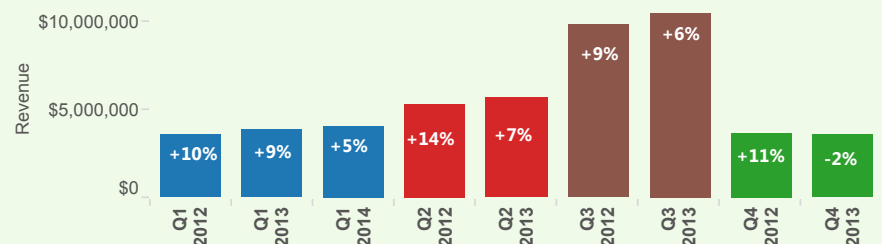


\*Data for Amtrak Riders only provided through May 2014. Data for Airport Deboardings current through June 2014.

## Staying in Montana

### Gross Lodging Tax Revenues (Q1 2012-Q1 2014)

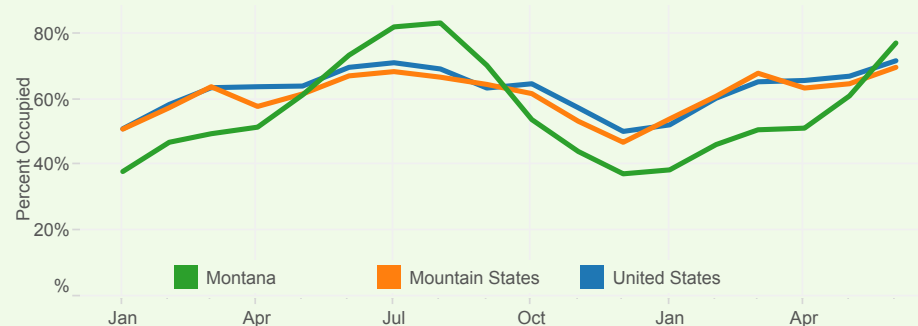
\*% is year-over-year difference for each quarter



**Please Note:** Revenue collected is 4% of lodging price. The year-over-year change in revenues are affected by rate increases, delinquencies and other factors. They should not be considered an equal correlation of increase or decrease in the number of travelers.

Source: MT Department of Commerce, Office of Tourism

### Hotel Occupancy Percentage (January 2013-June 2014)



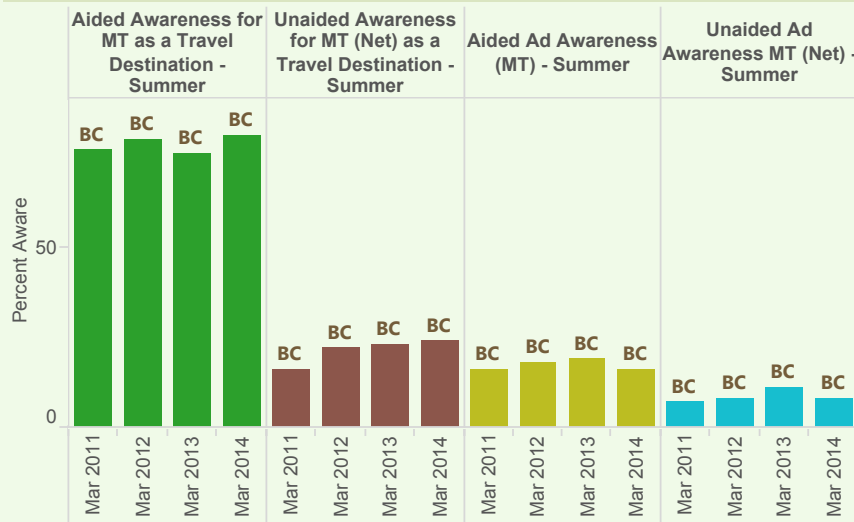
Source: Smith Travel Research

# Leisure Trends Group Study Results



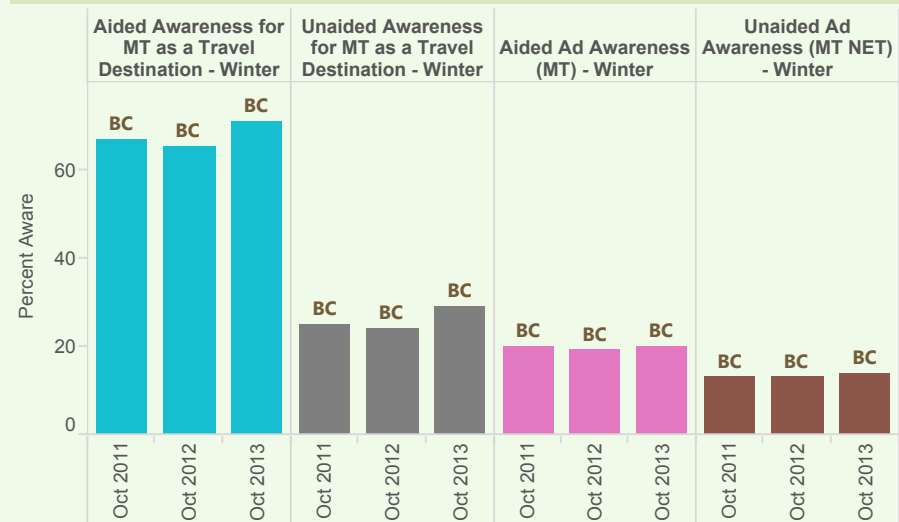
## Before Campaign (BC)

### LTG Summer Awareness Metrics



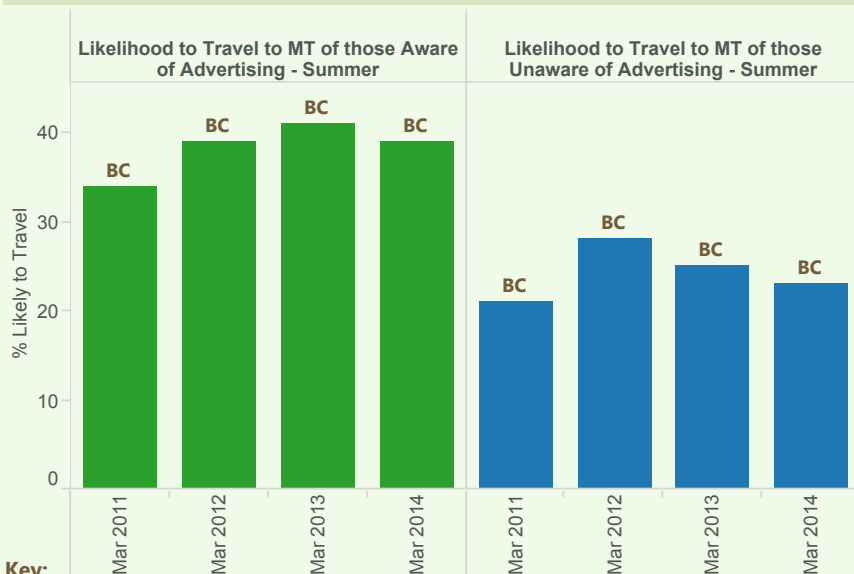
Source for Summer metrics: Leisure Trends Group Brand Awareness Study Wave 11 (March 2014)

### LTG Winter Awareness Metrics

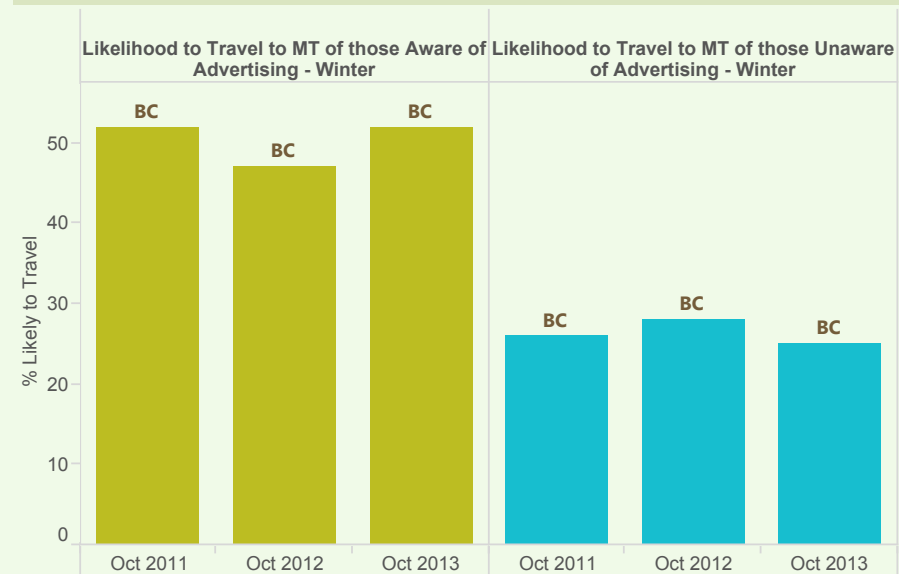


Source for Winter metrics: Leisure Trends Group Brand Awareness Study Run 6 (Dec 2013)

### LTG Summer Intent Metrics



### LTG Winter Intent Metrics



Key:

BC = Before Campaign

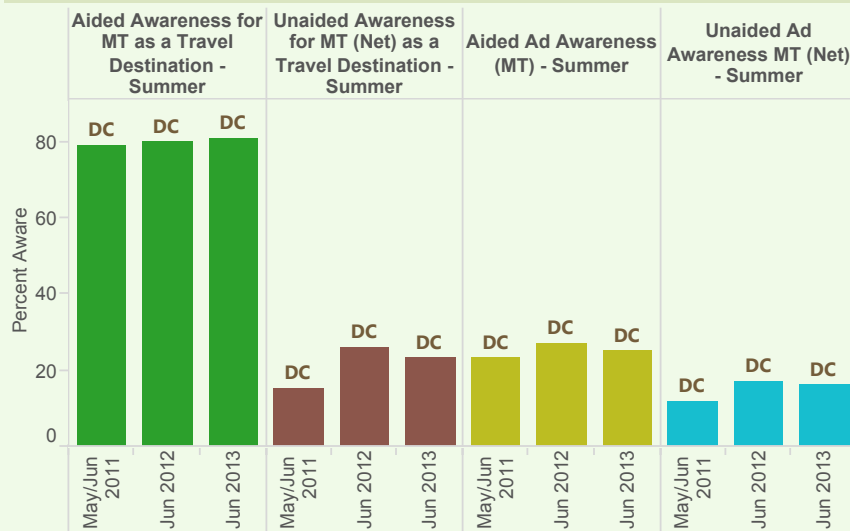
DC = During Campaign

# Leisure Trends Group Study Results



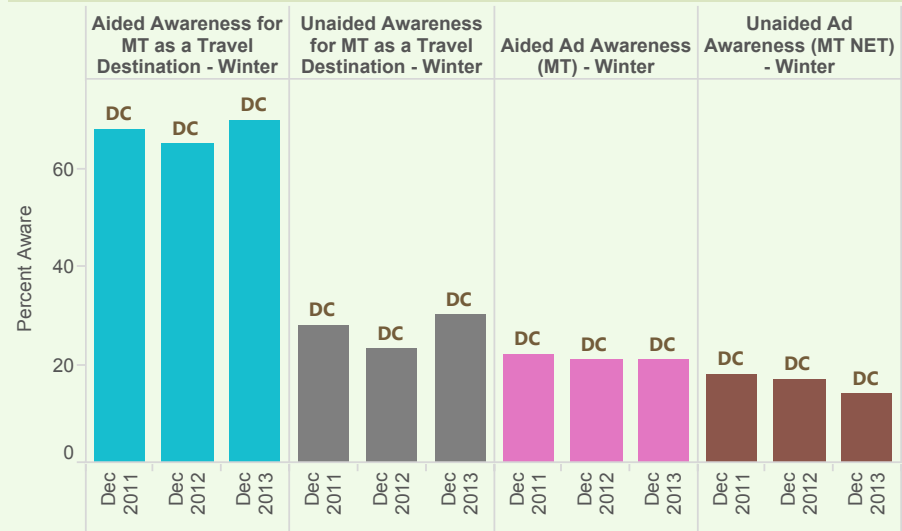
## During Campaign (DC)

### LTG Summer Awareness Metrics



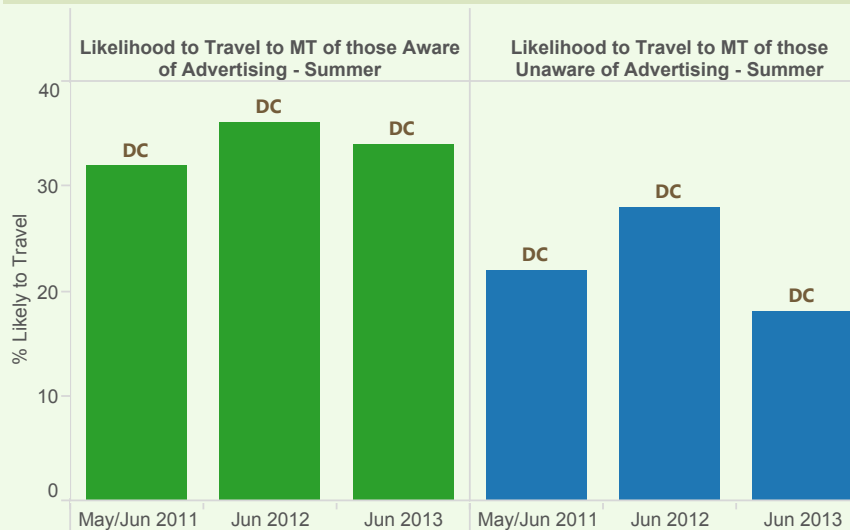
Source for Summer metrics: Leisure Trends Group Brand Awareness Study Wave 11 (March 2014)

### LTG Winter Awareness Metrics

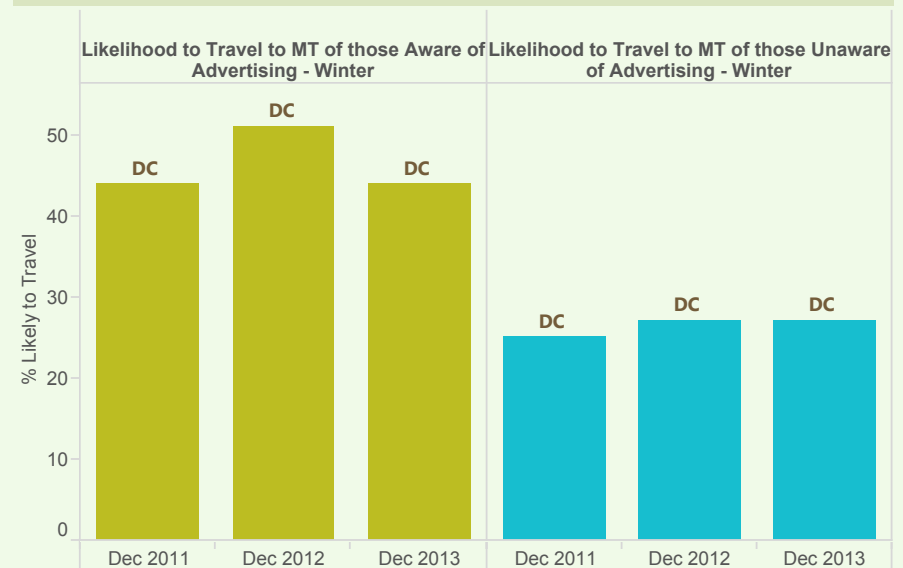


Source for Winter metrics: Leisure Trends Group Brand Awareness Study Run 6 (Dec 2013)

### LTG Summer Intent Metrics



### LTG Winter Intent Metrics



Key:

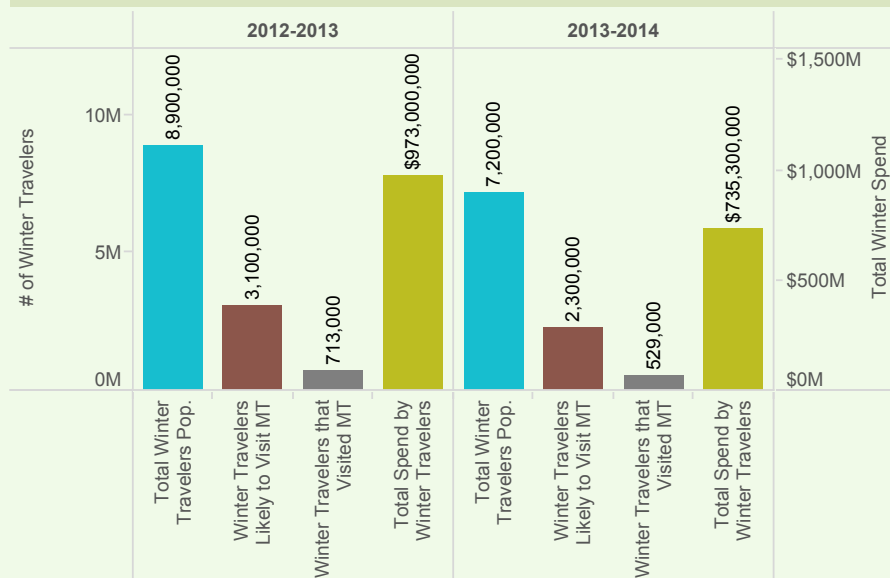
BC = Before Campaign

DC = During Campaign

# Leisure Trends Group Study Results

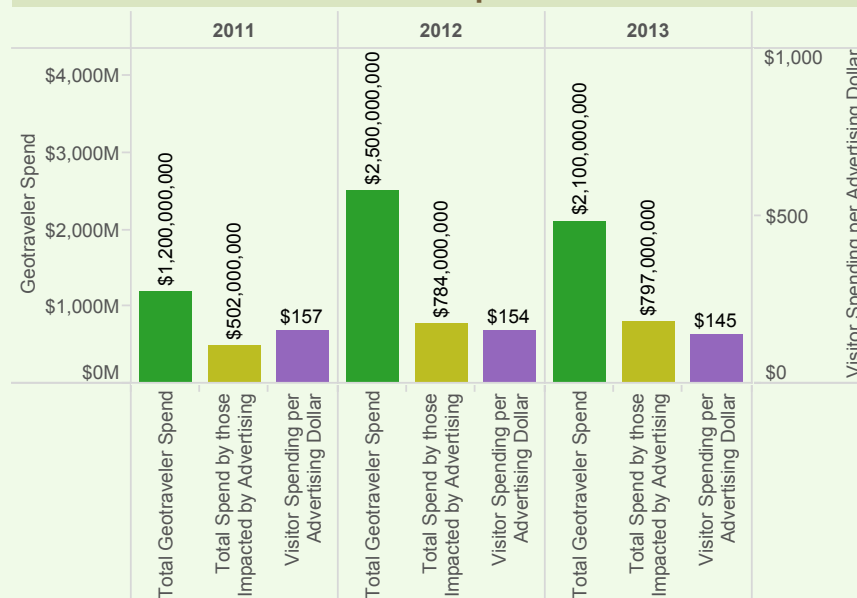


## Winter Traveler Conversion Funnel



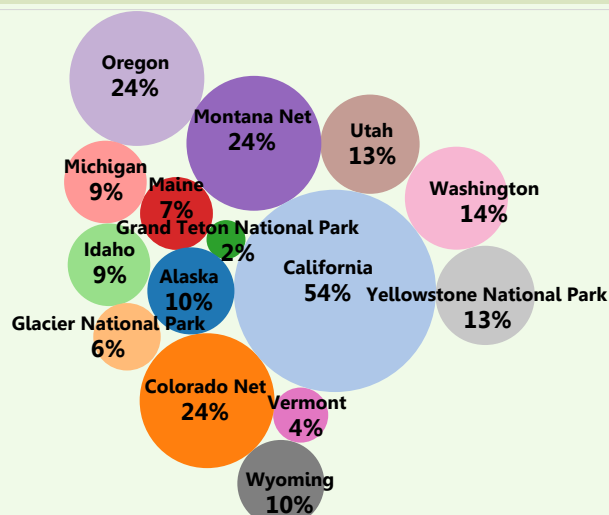
Source: Leisure Trends Group Winter Conversion Study (March 2014)

## Summer Geotraveler Economic Impact



Source: Leisure Trends Group Summer Conversion Study (2013)

## Unaided Awareness as a Travel Destination among Competitors (March 2014)



Source: Leisure Trends Group Brand Awareness Study Wave 11 (March 2014)

## Leisure Trends Group Highlights

- The most recent reports from Leisure Trends Group includes the Brand Awareness Study Wave 11 (March 2014) and the Winter Conversion Study (April 2014).
- Key takeaways from the Wave 11 study include:
  - Unaided and aided advertising awareness of Montana (net) has risen significantly among Geotravelers since February 2009, an increase of 133% in unaided advertising awareness and a 100% increase in aided advertising awareness.
  - 39% of the Geotravelers who are aware of the advertising indicated that they are likely to travel to Montana in the next 18 months.
  - Since February 2009, there has been a 43% increase in Geotravelers who have indicated that they have ever traveled to Montana.
- Key takeaways from the Winter Conversion study include:
  - Winter travelers living in the Seattle market were most likely to have traveled to Montana in the past 12 months (29%) followed by Minneapolis (28%), and Portland (25%), with Chicago having the least amount of past 12 month visitors to Montana (18%).
  - At 29%, Colorado was the only travel destination to have more winter travelers visit in the past 12 months than Montana.
  - At least 7 in 10 winter travelers plan to visit Montana either within the next 2 years (70%) or more than 2 years from now (77%). The winter months that travelers are most likely to visit Montana include February (24%), and March (19%).



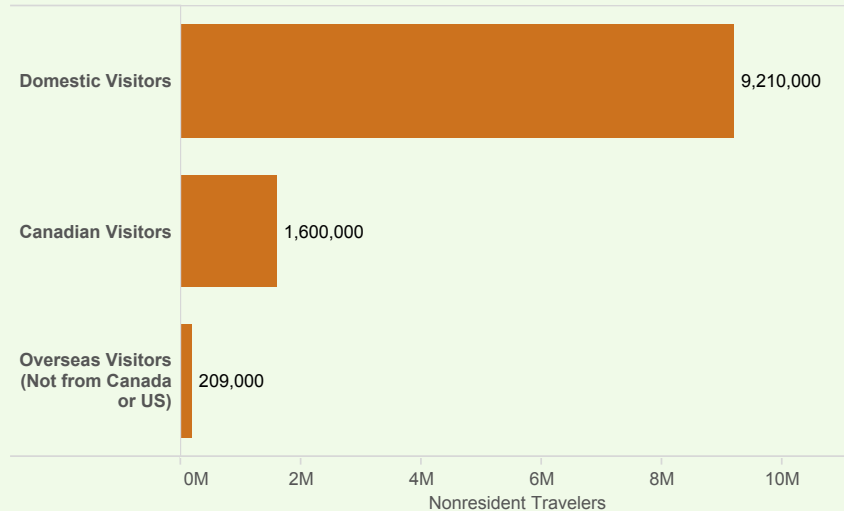
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\*This view has not changed from last dashboard delivery

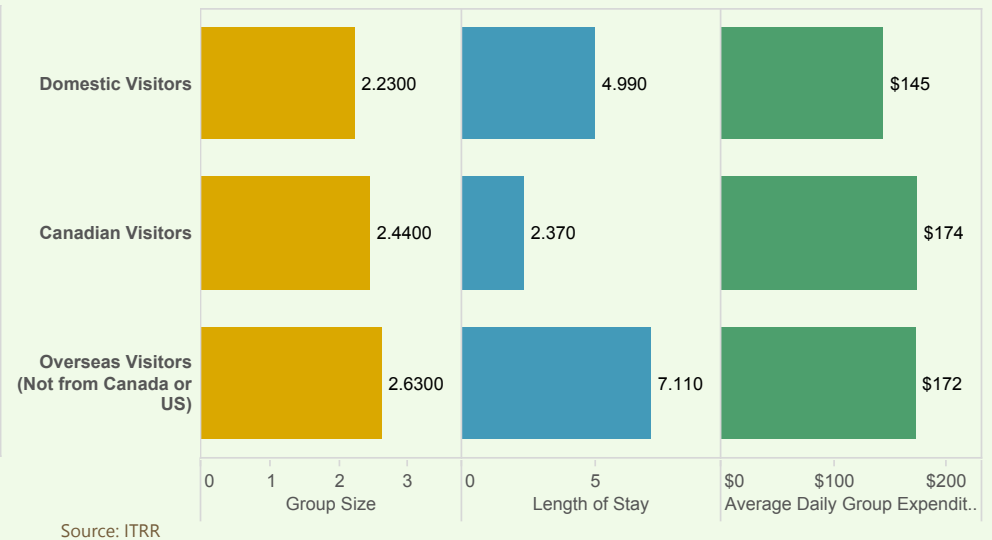
# International Visitation

## Visitor Profile

### Number of Visitors (2013)

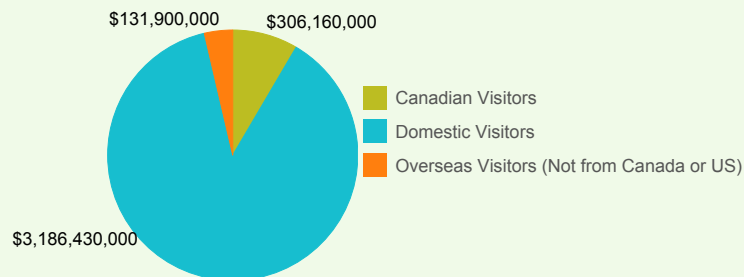


### International Visitor Behaviors (2013)



## Economic Impact

### Montana Visitor Expenditures (2013)



**Projected Total Economic Impact of Rooms Sold January 1-June 30, 2013\***

**\$3,928,430**

Source: NAJTRAX

\*Economic Impact information provided by NAJTRAX represents only 13 Receptive Tour Operators, and it only shows a portion of the overall impact of the overseas visitor to Montana

## International Visitation Highlights

-Due to data availability, this data has not changed from the last Quarterly Dashboard.

-In 2013, overseas visitors represented only 2% of all nonresident travelers to Montana.

-These overseas visitors stayed longer and spent more money than other types of visitors to Montana, representing 4% of all expenditures in 2013.

-Their length of stay was up 6% and their expenditures were up 4% over 2012.



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# Appendix

## Additional Comments and Definitions

### Additional Tourism Comments

-More tourists visited and spent money in Montana in 2013 than ever before: more than 11 million people, spending \$3.62 billion.

-Overall national park visitation for Q1 and Q2 is currently difficult to assess with several parks not yet reporting numbers. However, during Q2 2014, visitation to Glacier National Park was slightly higher than Q2 2013 and Yellowstone National Park experienced an increase of 7% in Q2 2014 over Q2 2013.

-Skier visitation numbers from the 2013-2014 season were reported at a 6.54% increase over 2012-2013.

-Through June 2014, visitation at state parks was up 2%, which has it on track to surpass 2013, which was the highest visitation on record at over 2.1 million visits. State parks typically see lower visitation in the winter months and, in general, can see quite a bit of fluctuation in visitation based on weather patterns. February 2014 was quite cold, which may have accounted for a decrease at some parks.

-Airport deboardings increased in Q2 2014 over Q2 2013, showing a 6% year-over-year increase. Amtrak ridership is down year-over-year with June 2014 numbers not yet available. Traveling by motorized vehicle is down slightly year-over year, showing a decrease of 7% in Q1 and less than 1% decrease in Q2.

-Smith Travel Research indicated a slight increase of 1.5% in hotel occupancy in June 2014 over June 2013. Montana's occupancy rate was at 77.1 versus the Mountain rate at 69.7% and the U.S. rate at 71.7%.

### Definitions

**Social Engagements:** An action taken to interact with a social page (Facebook, Twitter, Instagram, or Tumblr). For example, Likes, Comments, or Shares on Facebook are considered Social Engagements.

**Consideration Mentions:** A number representative of the people considering making a trip to Montana across the social web through a social listening tool, Brand-watch. This query captures prospects specifically in the consideration phase of the marketing funnel, using terms such as "want to visit" or "could book a trip."

**Impressions:** Number of times a particular piece of content is viewed.

**CTR:** Click-through-rate;  $(\text{Clicks}/\text{Impressions} * 100\%)$

**CPC:** Cost per Click;  $(\text{Cost}/\text{Clicks})$

**Website Visitation:** The gross number of website sessions.

**Bounce Rate:** The proportion of site visits that only go one-page deep into the site.

**Geotravelers:** Place a premium on nature, wildlife, being comfortable, great experiences and a sense of exhilaration. Active in outdoors with both rigorous and/or leisurely activity.

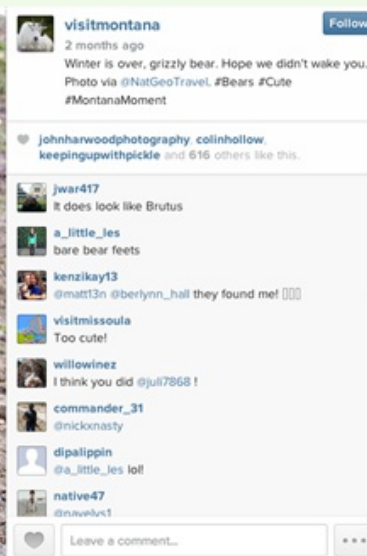




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# Appendix

## Social Media Copy



Wildlife crossing.  
What a day for a road trip.

3 months ago  
Tagged #Montana #MontanaMoment #Bison #Wildlife #Buffy animals

Clockwise from top:  
Facebook, Twitter,  
Tumblr, Instagram